

Aboriginal Information Systems



Housing

User Reference

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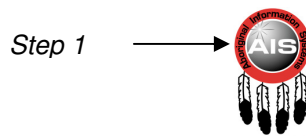
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Section 1: Getting Started

Logging in to AIS

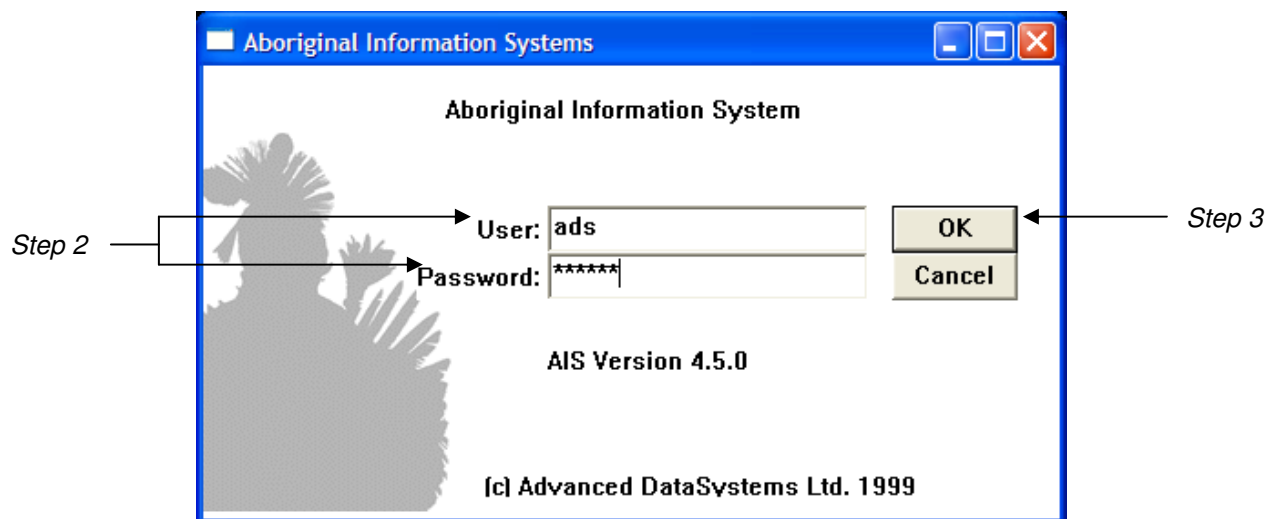
STEP 1: Double click the shortcut on your desktop:

Figure 1



You will then see the AIS Login Screen:

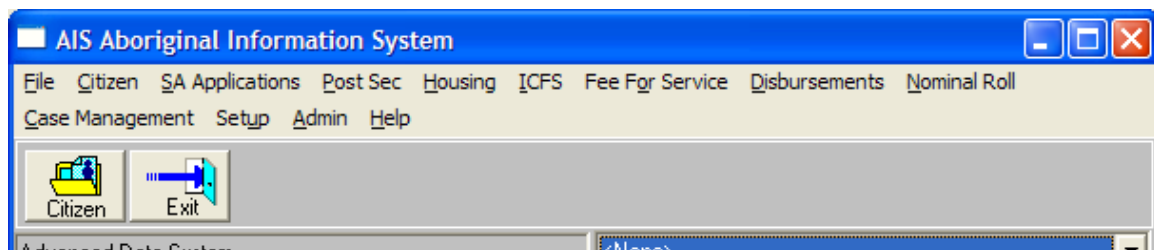
Figure 2



STEP 2: Enter your USER ID and PASSWORD.

STEP 3: Click OK. When you have successfully logged in, you will see the "AIS COMMAND CENTER", as shown below:

Figure 3

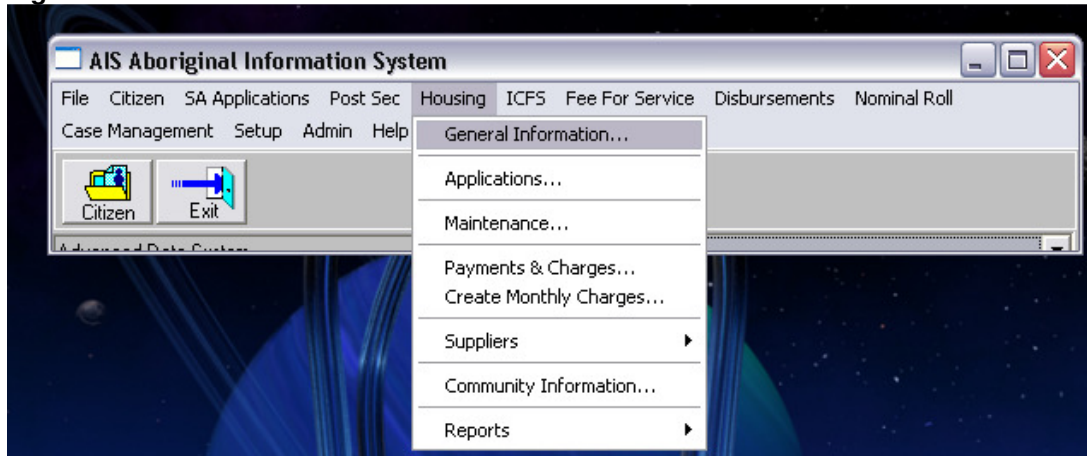


Section 2: Add a Unit

Adding a New Housing Unit

STEP 1: From the AIS COMMAND CENTER, select HOUSING, then Housing Information ...as shown below:

Figure 4



You will then see the “Housing General Information” as shown below:

Figure 5

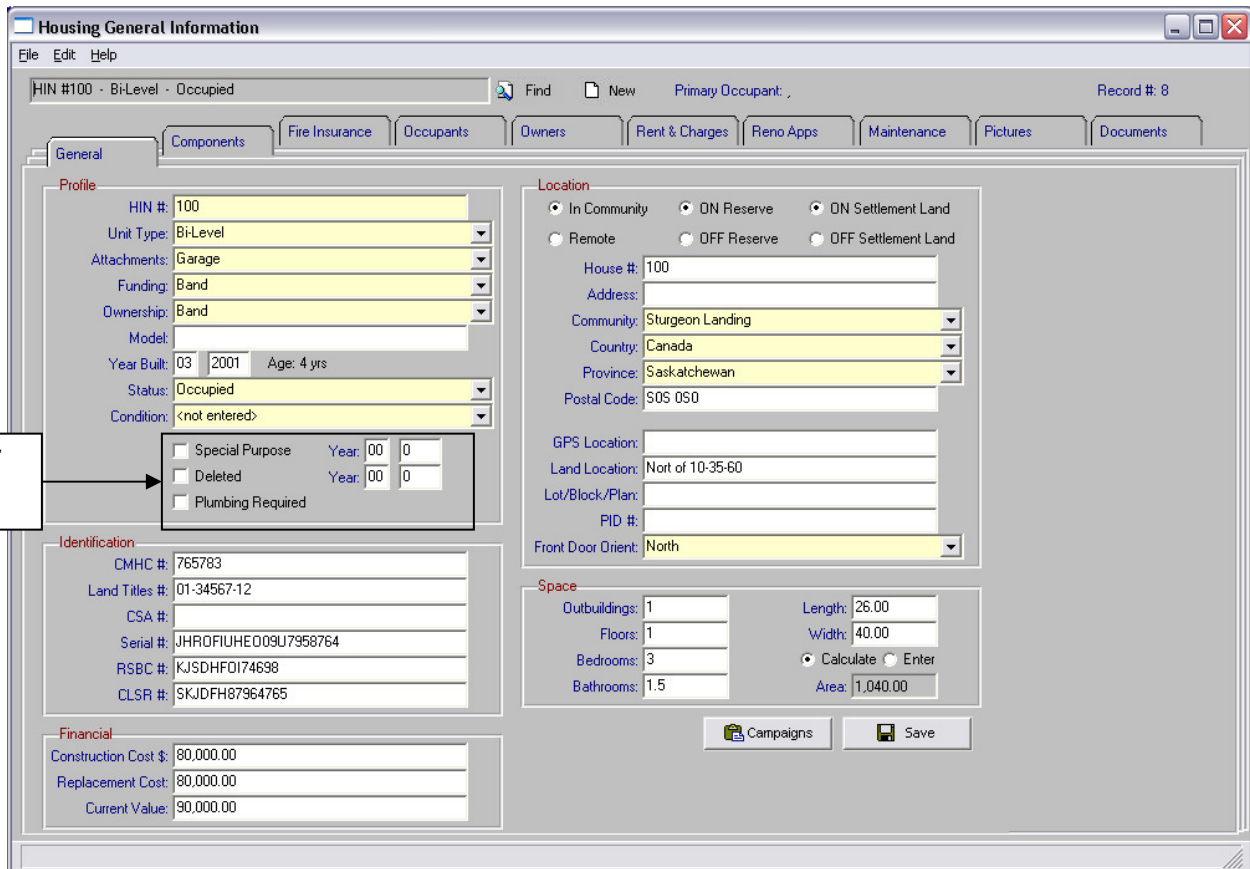
Step 2

A screenshot of the 'Housing General Information' form. The form has a menu bar (File, Edit, Help) and a toolbar with 'Find' and 'New' buttons. Below the toolbar are tabs for General, Components, Fire Insurance, Occupants, Owners, Rent & Charges, Reno Apps, Maintenance, Pictures, and Documents. The 'General' tab is active, showing several sections: Profile (with fields for HIN #, Unit Type, Attachments, Funding, Ownership, Model, Year Built, Status, Condition, and checkboxes for Special Purpose, Deleted, and Plumbing Required), Identification (with fields for CMHC #, Land Titles #, CSA #, Serial #, RSBC #, and CLSR #), Financial (with fields for Construction Cost \$, Replacement Cost, and Current Value), Location (with radio buttons for In Community, Remote, On Reserve, Off Reserve, On Settlement Land, and Off Settlement Land, and fields for House #, Address, Community, Country, Province, Postal Code, GPS Location, Land Location, Lot/Block/Plan, PID #, and Front Door Orient), and Space (with fields for Outbuildings, Floors, Bedrooms, Bathrooms, Length, Width, and Area, along with Calculate and Enter buttons). At the bottom right are buttons for Campaigns and Save.

STEP 2: Click the NEW  button at the top right hand side.

STEP 3: Enter all information about the housing unit with as much detail as you have, as shown in the example below:

Figure 6



Housing General Information

File Edit Help

HIN #100 - Bi-Level - Occupied Find New Primary Occupant: Record #: 8

General Components Fire Insurance Occupants Owners Rent & Charges Reno Apps Maintenance Pictures Documents

Profile

HIN #: 100
Unit Type: Bi-Level
Attachments: Garage
Funding: Band
Ownership: Band
Model:
Year Built: 03 2001 Age: 4 yrs
Status: Occupied
Condition: <not entered>

☐ Special Purpose Year: 00 0
☐ Deleted Year: 00 0
☐ Plumbing Required

Location

☒ In Community ☐ ON Reserve ☐ ON Settlement Land
☐ Remote ☐ OFF Reserve ☐ OFF Settlement Land

House #: 100
Address:
Community: Sturgeon Landing
Country: Canada
Province: Saskatchewan
Postal Code: S0S 0S0
GPS Location:
Land Location: Nort of 10-35-60
Lot/Block/Plan:
PID #:
Front Door Orient: North

Space



Outbuildings: 1 Length: 26.00
Floors: 1 Width: 40.00
Bedrooms: 3 ☒ Calculate ☐ Enter
Bathrooms: 1.5 Area: 1,040.00


Identification

CMHC #: 765783
Land Titles #: 01-34567-12
CSA #:
Serial #: JHRDFIUHE009U7958764
RSBC #: KJSDHFOI74698
CLSR #: SKJDFH87964765

Financial

Construction Cost \$: 80,000.00
Replacement Cost: 80,000.00
Current Value: 90,000.00

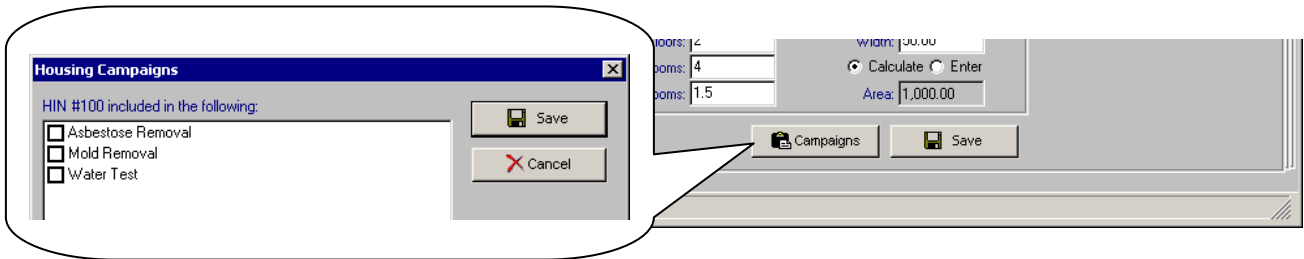
STEP 4: SAVE the information you have entered by clicking the  button on the bottom right hand side, as illustrated above.

NOTE: ☒ *Special Purpose, Deleted, or Plumbing Required* if the unit is to be reported as such to INAC on the Annual "HAIRS" report.

Campaigns

“Campaigns” refer to mass projects. For example, if your department will be conducting a blanket water test, and you want to include this house in the test, you can add it by doing the following:

STEP 1: While viewing the “General” tab of a Unit, click the CAMPAIGN button next to the SAVE button at the bottom.



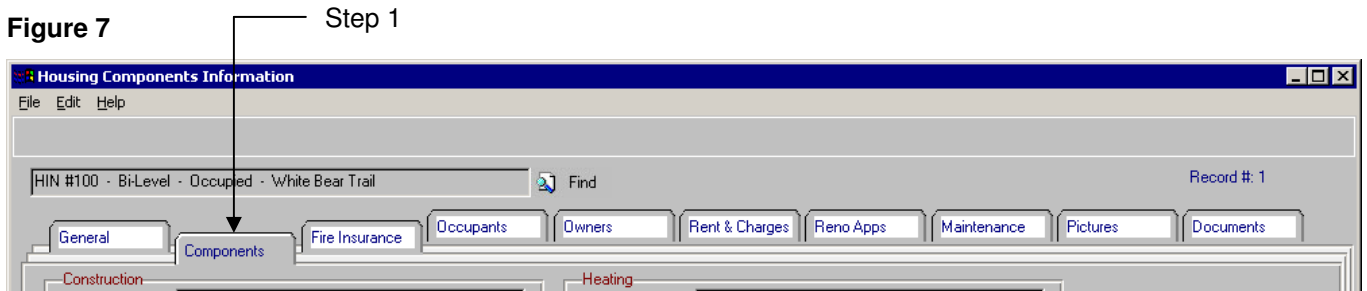
STEP 2: Check the items you wish to include.

STEP 3: Click .

Components

STEP 1: Click the COMPONENTS tab, as shown below:

Figure 7



STEP 2: Enter all information about the housing unit components with as much detail as you have, as shown in the example below:

Figure 8

The screenshot shows the 'Housing Components Information' window with the 'Components' tab selected. The window is divided into two main sections: 'Construction' and 'Heating'. The 'Construction' section contains a list of fields with dropdown menus: Foundation (Cement), Basement (Cement), Exterior (Vinyl Siding), Roof (Asphalt Shingles), Crawl Space (<none>), Bsmtd Developed (Fully), Outbuildings (Shed), Disabilities (<none>), Skirting (<none>), Blocking (<none>), and Seismic (<none>). The 'Heating' section contains a list of fields with dropdown menus: Primary (Natural Gas), Secondary (<none>), Furnace (Natural Gas), and Chimney (Aluminum). Below these sections are the 'Electrical' and 'Insulation' sections. The 'Electrical' section contains 'Electric Source' (Breakers) and 'Panel Box' (Breakers). The 'Insulation' section contains 'Ceiling' (Fibre Glass), 'Walls' (Fibre Glass), 'Basement' (Fibre Glass), and 'Floor' (Fibre Glass). At the bottom right, there is a 'Save' button. The 'Plumbing' section is partially visible at the bottom left, showing fields for Water (Delivery), Sewage Servicing (Lagoon), Sewage Effluent (<none>), Water Quality (Drinking Quality), Hot Water (Electric Heater), Water Softener (Installed), Perimeter Drain (<none>), and Last Pump Out (//).

STEP 3: Click  Save.

Fire Insurance

STEP 1: Select the FIRE INSURANCE tab, as shown below:

Figure 9



STEP 2: Enter all information about the fire components with as much detail as you have, including information about the Fire Insurance Policies, as shown in the example below:

Figure 10

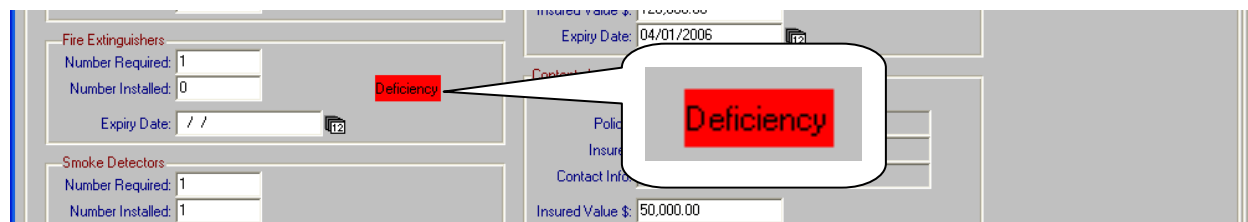
The screenshot shows the same software window as Figure 9, but with the "Fire Insurance" tab selected and data entered. The window is divided into several sections:

- Fire Protection:** Includes a dropdown for "Fire Services" (First Nation Fire Department), a text field for "Contact Info" (J. Henderson), and input fields for "KMs to Fire Service" (2.0) and "Meters to Hydrant" (200.0).
- Fire Extinguishers:** Includes input fields for "Number Required" (1) and "Number Installed" (1), and a date field for "Expiry Date" (// /).
- Smoke Detectors:** Includes input fields for "Number Required" (1) and "Number Installed" (1).
- Fire Insurance:** Includes input fields for "Policy" (876-345-098), "Insurer" (Eagle Insurance), "Contact Info" (Terry Heimbecker), "Insured Value \$" (120,000.00), and "Expiry Date" (01/02/2006).
- Contents Insurance:** Includes a checkbox for "Same as Fire Insurance" (checked), and input fields for "Policy" (876-345-098), "Insurer" (Eagle Insurance), "Contact Info" (Terry Heimbecker), "Insured Value \$" (50,000.00), and "Expiry Date" (01/02/2006).

A "Save" button is located at the bottom right of the window.

STEP 3: Click  Save.

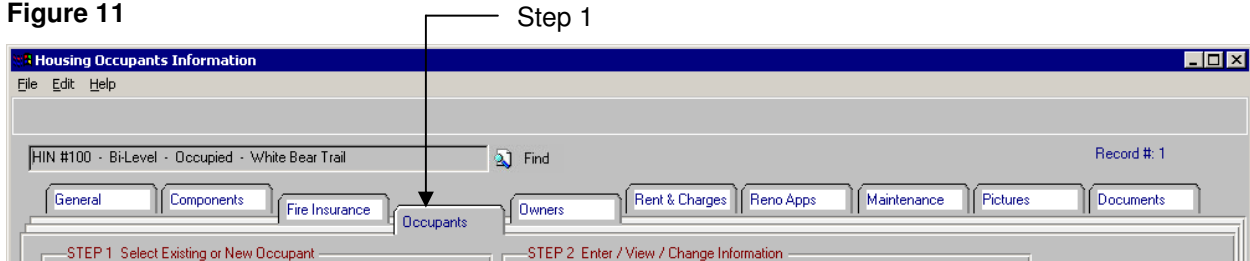
NOTE: By entering the **REQUIRED** number of Fire Extinguishers and Smoke Detectors, you are setting a "default". If the Number Installed is less than this number a "DEFICIENCY" warning will appear, as shown below:



Adding an Occupant

STEP 1: Select the OCCUPANTS tab, as shown below:

Figure 11



STEP 2: Click  **New**

STEP 3: Enter all information about the occupant(s) as shown in the example below:

Figure 12

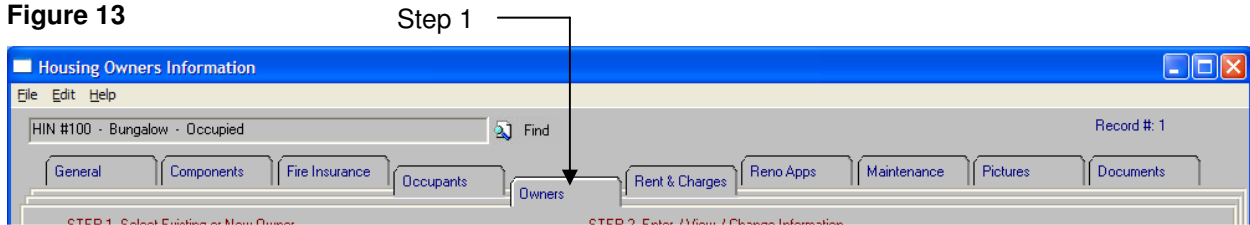
[illegible]

STEP 4: Click Save

Owners

STEP 1: Select the OWNERS tab, as shown below:

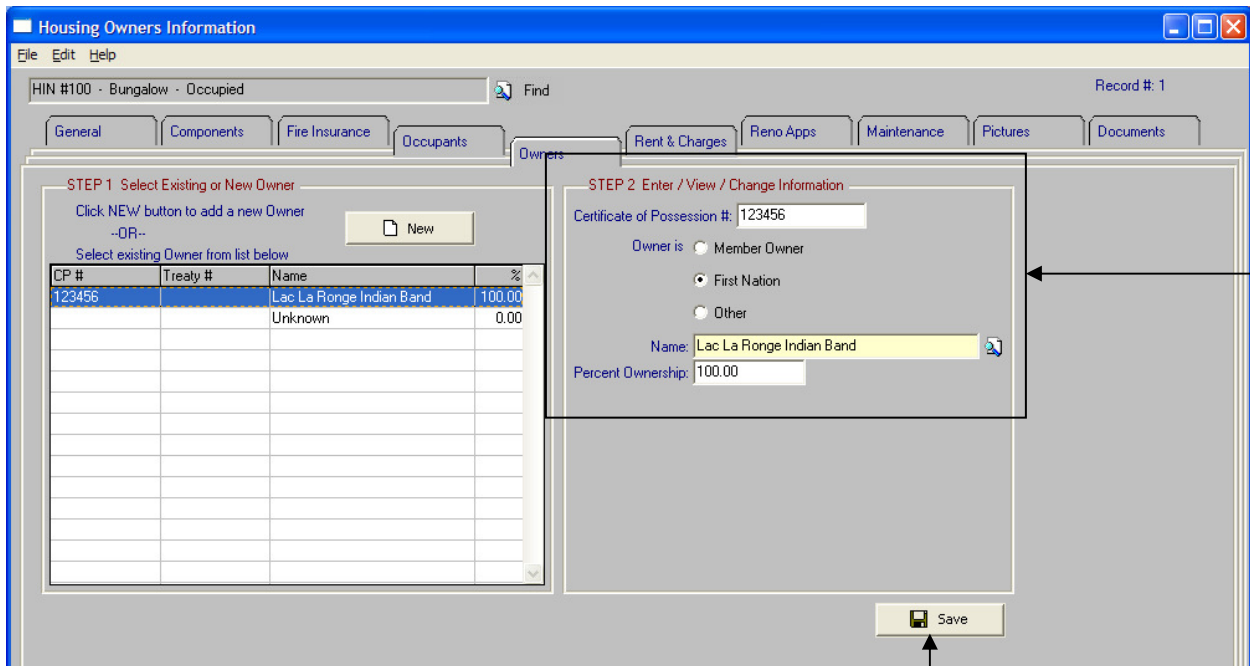
Figure 13



STEP 2: Click  **New**.

STEP 3: Enter all information about the owner(s) in the right frame of the window, as shown in the example below:

Figure 14



STEP 4: Click  **Save**.

NOTE: Depending on which category of owner you select (Member, First Nation or Other) will determine which "browse" table will appear when you select the browse button at the end of the Name field.

More than one owner can be added, however ALL must total 100% ownership.

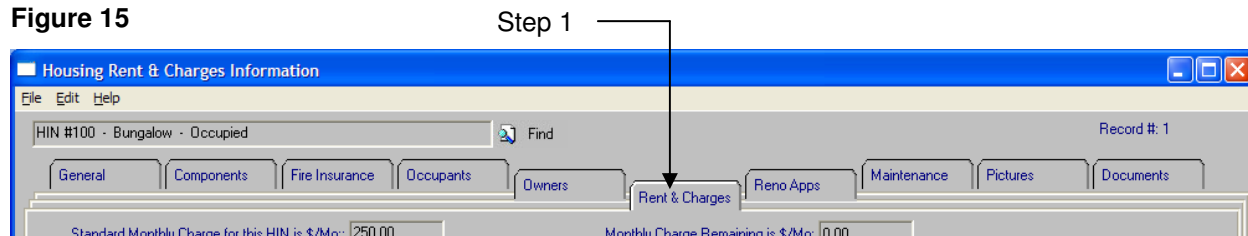
Rent and Charges

OVERVIEW: This screen is used in three ways: (1) To determine the total of rent and a breakdown of all charges included in the rental charges; (2) To maintain the name of the individual or organization responsible for rental payments; (3) To provide a read-only summary of rental charges, payments received, and any outstanding balances.

Setting the Monthly Rental Charge Default

STEP 1: Select the RENT & CHARGES tab, as shown below:

Figure 15




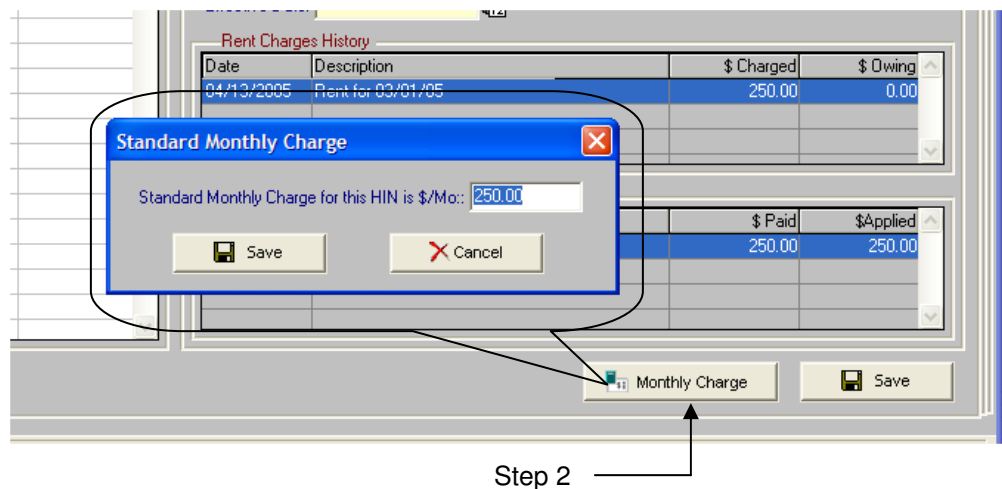
STEP 2: Select the  Monthly Charge button. A pop-up window will appear, as shown below:

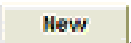

Figure 16



STEP 3: Enter the total monthly charge.

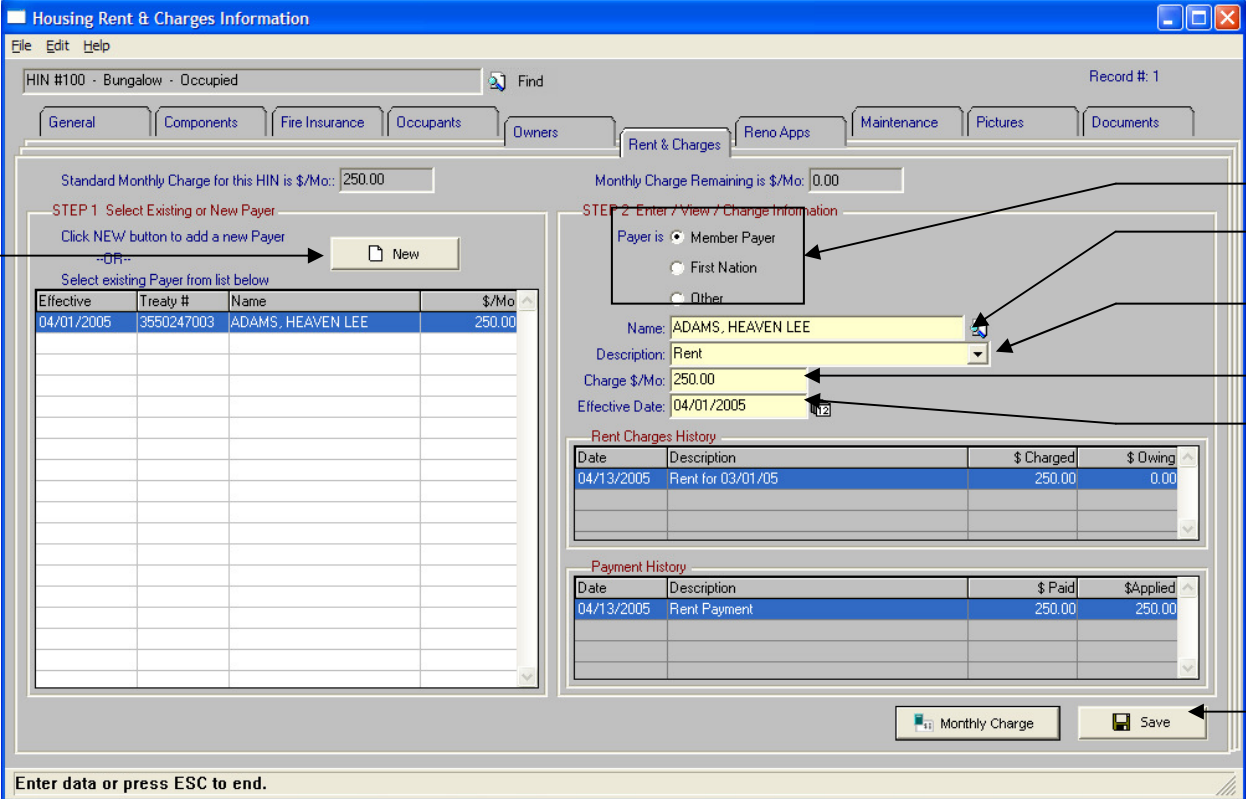
STEP 4: Click .

Add New Payer

- STEP 1:** Select .
- STEP 2:** Select the category the payer falls into (ie: Member, First Nation or Other.)
- STEP 3:** Click the  at the end of the Name field.
- STEP 4:** Search for the Person/First Nation.
- STEP 5:** Select the appropriate description type from the drop down list.
- STEP 6:** Enter the effective date for the charge.

Refer to the example below:

Figure 17



The screenshot shows the 'Housing Rent & Charges Information' window. The 'Rent & Charges' tab is selected. The window displays a table of existing payers and a form for adding a new payer. Annotations point to specific steps in the process:

- Step 1:** Points to the 'New' button in the 'STEP 1: Select Existing or New Payer' section.
- Step 2:** Points to the 'Payer is' radio button group (Member Payer, First Nation, Other).
- Step 3:** Points to the search icon at the end of the 'Name' field.
- Step 4:** Points to the 'Name' field containing 'ADAMS, HEAVEN LEE'.
- Step 5:** Points to the 'Description' dropdown menu.
- Step 6:** Points to the 'Effective Date' field.
- Step 7:** Points to the 'Save' button at the bottom right.

The 'Rent Charges History' table shows the following data:

Date	Description	\$ Charged	\$ Owning
04/13/2005	Rent for 03/01/05	250.00	0.00

The 'Payment History' table shows the following data:

Date	Description	\$ Paid	\$ Applied
04/13/2005	Rent Payment	250.00	250.00

ABOUT RENT AND PAYMENT HISTORY: Rental Charges and Payments are entered and recorded under the **Payments and Charges** menu option under Housing on the AIS Command Center. This screen only provides the details as “read-only” and cannot be modified here. For more information, please refer to the section titled “Payments and Charges” in this User Manual.

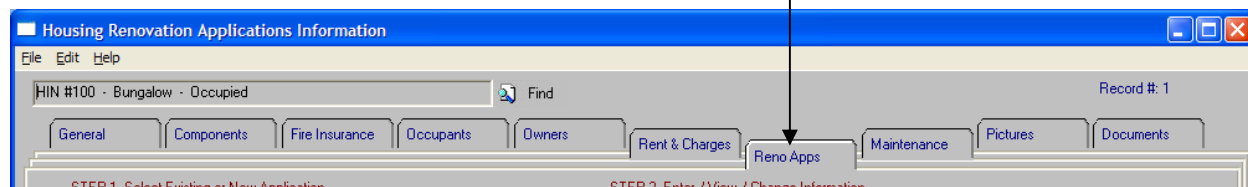
Renovation Applications

OVERVIEW: Reno Applications differ from a maintenance or service call in that it follows the process should an individual wish to cosmetically modify the housing unit they reside in. This screen allows you to process the request.

STEP 1: Select the RENO APPS Tab at the top, as shown below:

Figure 18

Step 1



You will then see the following screen:

Step 2

The screenshot shows the 'Housing Renovation Applications Information' window with the 'Reno Apps' tab selected. The window is divided into two main sections. The left section is titled 'STEP 1 Select Existing or New Application' and contains a 'Click NEW button to add a new Application' instruction, a '--OR--' separator, and a 'New' button. Below this is a table titled 'Select existing Application from list below' with columns 'Date', 'App-Status', 'Estimate \$', and 'System'. The table contains one row with the following data: Date: 04/01/2005, App-Status: Pending, Estimate \$: 1,000.00, System: Construction. The right section is titled 'STEP 2 Enter / View / Change Information' and contains several fields: 'Application #' (0), 'Date' (04/01/2005), 'App-Status' (Pending), 'Estimated \$' (1,000.00), 'System' (Construction), 'Funding Source' (FN Housing Budget), 'Request' (Replace kitchen cabinets and flooring), and 'Notes'. At the bottom right of the right section are 'Delete' and 'Save' buttons. Arrows point from the text 'Step 2' to the 'New' button, and from 'Step 3' to the 'Date' field, 'Step 4' to the 'App-Status' field, 'Step 5' to the 'Estimated \$' field, 'Step 6' to the 'System' field, 'Step 7' to the 'Funding Source' field, 'Step 8' to the 'Request' field, and 'Step 9' to the 'Save' button.

Date	App-Status	Estimate \$	System
04/01/2005	Pending	1,000.00	Construction

Step 3

Step 4

Step 5

Step 6

Step 7

Step 8

Step 9

STEP 2: Select to begin a new application.

STEP 3: Enter the date of the application.

STEP 4: Set the Application Status field to "PENDING".

STEP 5: Enter the estimated amount of the renovations.

STEP 6: Select the appropriate System from the drop down list.

STEP 7: Select the appropriate Funding Source from the drop down list.

STEP 8: Enter more details of the request, if available.

STEP 9: Click .

Once the approval process has been completed, you will then need to enter a decision on the application, simply by doing the following:

Updating A Reno Application Status

STEP 1: Find the HOUSING UNIT record, and select the Reno Apps Tab.

STEP 2: Click on the pending application listed on the left side of the screen.

STEP 3: Select the appropriate decision from the drop down list in the field named “App Status”.

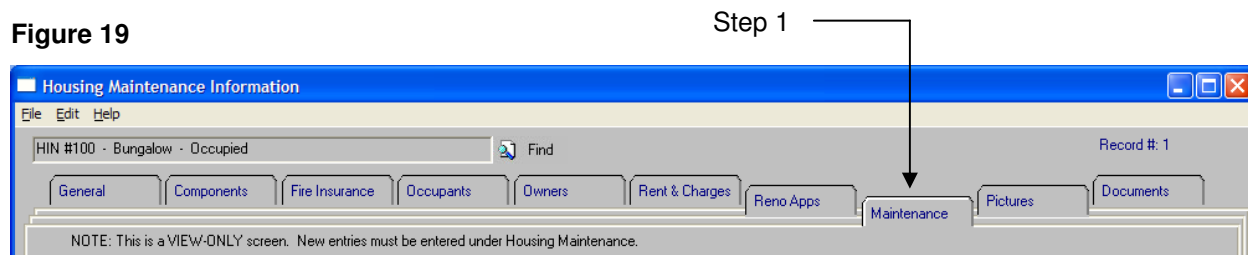
STEP 4: Click  to save your change.

Maintenance Information

OVERVIEW: This is a READ-ONLY screen. You cannot enter or modify the details on this screen. The information that appears here is entered and/or modified on the MAINTENANCE section of the Housing Module. *(Refer to the section titled “MAINTENANCE” in this User Manual for information on how to enter and modify Maintenance details.)* This screen allows you to quickly view all Service Calls, Inspection Orders, and Work Orders entered on behalf of a particular housing unit.

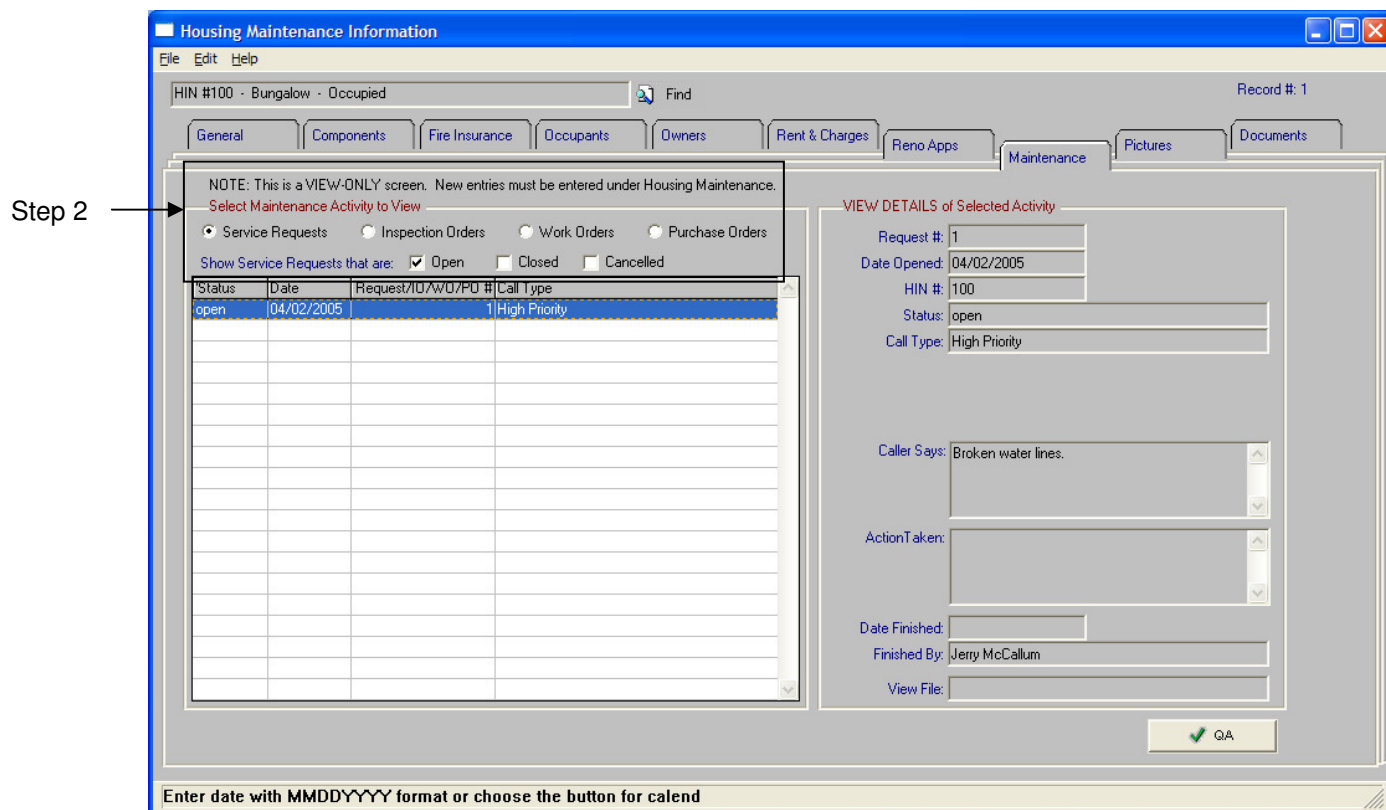
STEP 1: Select the MAINTENANCE Tab at the top, as shown below:

Figure 19



STEP 2: Select the options to include/exclude the maintenance types and statuses you wish to see listed, as shown in the example below:

Figure 20



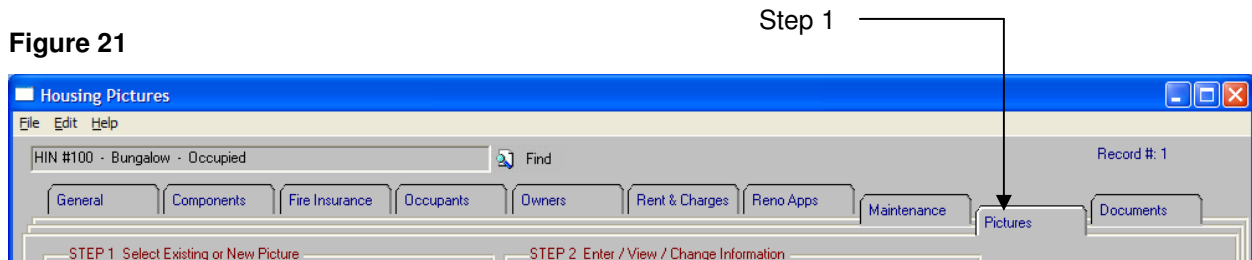
STEP 3: Click on the item in the list on the left to highlight it. Details of the request will be displayed in the fields on the right.

Adding Photos

OVERVIEW: Digital photos can be added to a Housing Unit record.

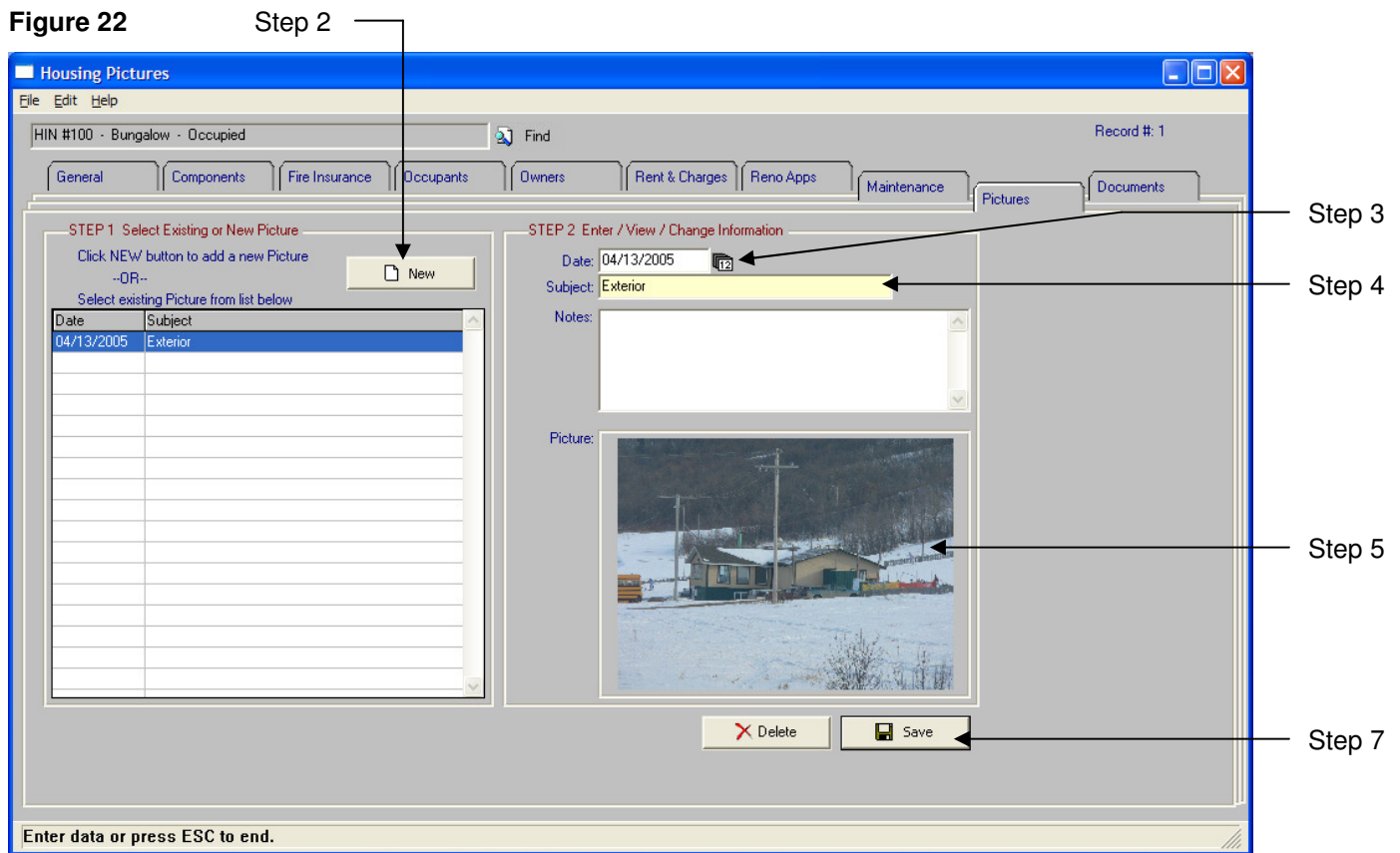
STEP 1: Select the PICTURES Tab at the top, as shown below:

Figure 21



You will then see the following screen:

Figure 22



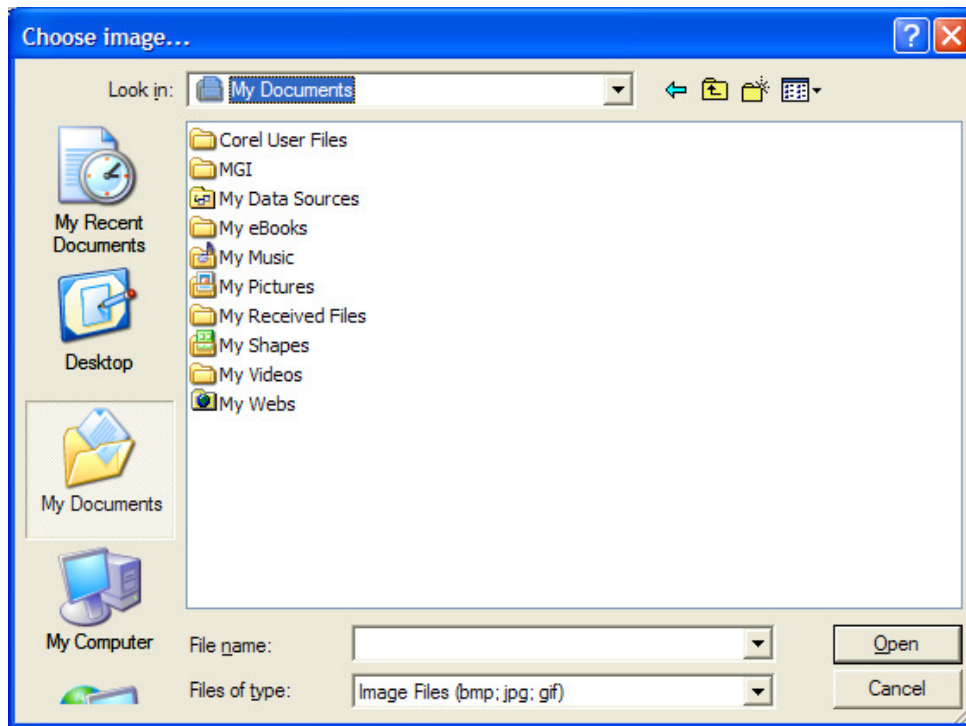
STEP 2: Click  New.

STEP 3: Enter the date of the Photo.

STEP 4: Enter a descriptive title in the subject field.

STEP 5: Double-click anywhere in the field labeled Picture. You will then see the Windows Browse window, as shown below:

Figure 23



STEP 6: Locate the digital photo and click OPEN.

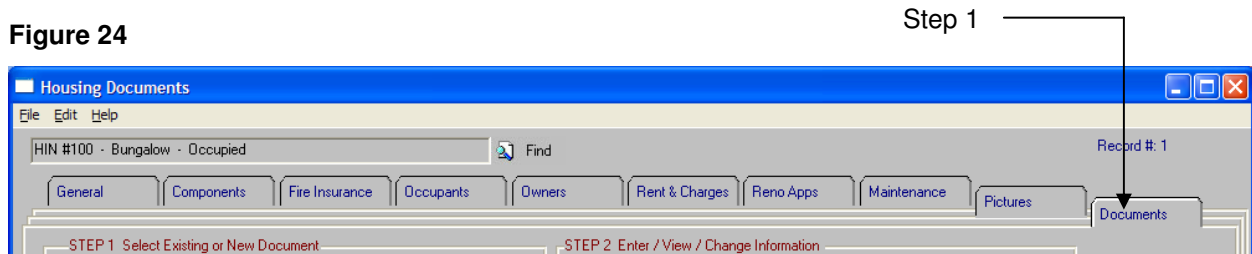
STEP 7: Click  Save.

Adding Documents

OVERVIEW: You can add documentation that is either scanned or in a readable format to any housing unit record.

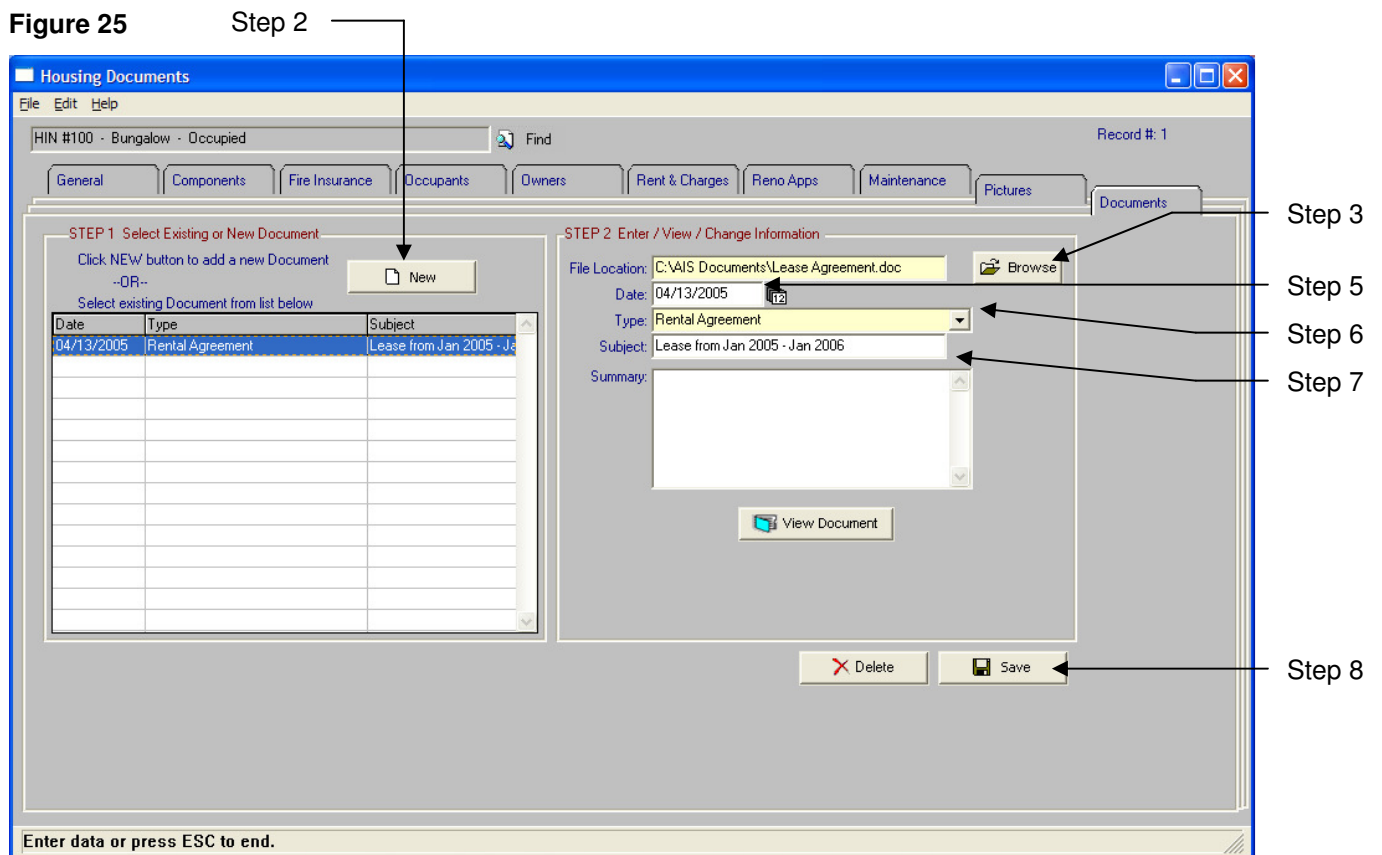
STEP 1: Select the DOCUMENTS Tab at the top, as shown below:

Figure 24

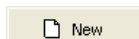


You will then see the following screen:

Figure 25



STEP 2: Click

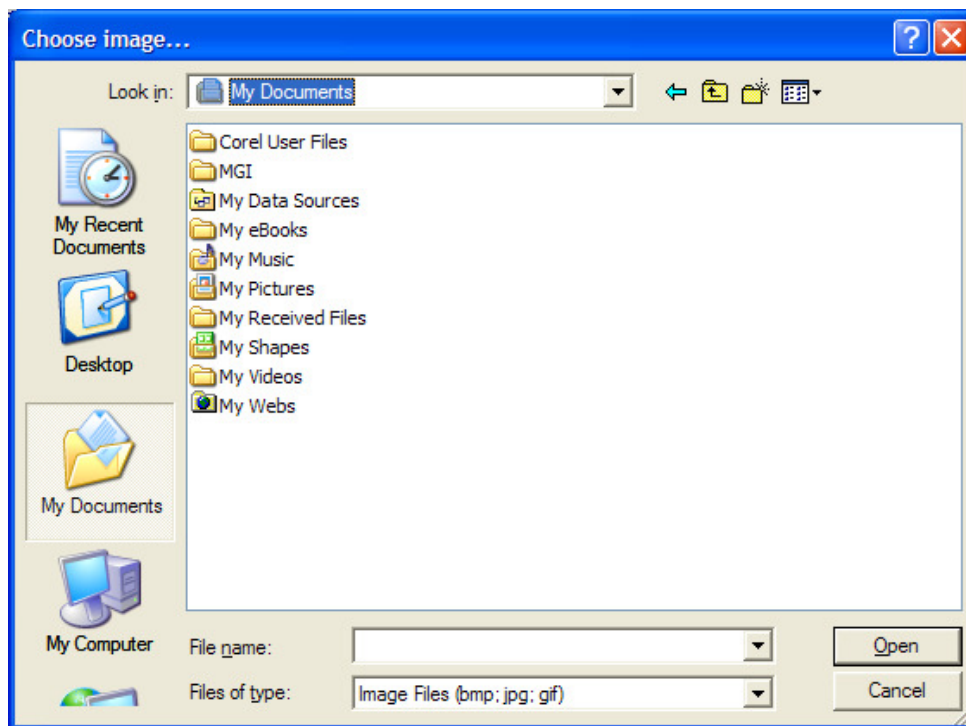


STEP 3: Click



at the end of the field named "File Location". You will then see the Windows Browse window, as shown below:

Figure 26



STEP 4: Locate the filename and click OPEN.

STEP 5: Enter the date.

STEP 6: Select the appropriate document type from the drop down list.

STEP 7: Enter a descriptive title in the Subject field.

STEP 8: Click  Save.

Once a document has been added to a record, you can view the document direct from the record, as described below:

Viewing a Document Added to a Record

STEP 1: Select the DOCUMENTS Tab at the top.

STEP 2: Click on the document description on the left that you wish to view to highlight it.

STEP 3: Click  View Document.

STEP 4: The applicable document format will launch the appropriate application and the document will be displayed.

Section 3: Maintenance

OVERVIEW: There are 4 types of requests and orders that can be entered and maintained on multiple units from this one screen:

- Service Requests
- Inspection Orders
- Work Orders
- Purchase Orders

“Service Calls” can be left open throughout the day, and as calls are received data entry can be made regardless of the housing unit because the detail of the maintenance call includes which house the call is on. All entries made from this screen are recorded and displayed in the read-only screen called “Maintenance” under the specific unit.

Entering a New Service Call

STEP 1: From the AIS Command Center, select HOUSING → MAINTENANCE. You will then see the following screen:

Figure 27

Step 2

Step 3

Step 4

Step 5

Step 9

Step 10

Step 11

Enter data or press ESC to end.

STEP 2: Click  New.

STEP 3: Enter the date of the call.

NOTE: The default status is OPEN.


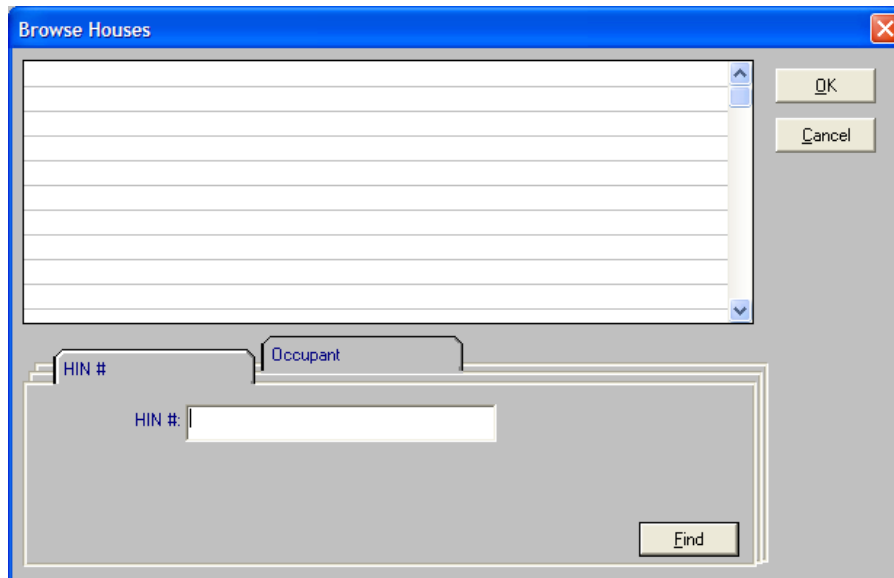
STEP 4: Click  at the end of the field named HIN#. You will then see the BROWSE HOUSES window, as shown below:

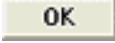
Figure 28



STEP 5: Type the first few numbers of the housing unit as the search criteria.

STEP 6: Click . A list of search results will appear.

STEP 7: In the list of results, click on the unit to highlight it.

STEP 8: Click . You will be returned to the MAINTENANCE window.

STEP 9: Select the appropriate Service Call Type from the drop down list.

STEP 10: Enter a brief description of the call in the field labeled "Caller Says:"

STEP 11: Click .

The call will now be listed on the left side of the window.

Once the call has been resolved, change the status of the call to "closed" or "cancelled" and add additional information pertaining to the action taken, as described below:


STEP 1: Click on the call in the list on the left side of the window to highlight it. The details entered will be displayed on the right side of the window.

STEP 2: Select the appropriate status ("closed" or "cancelled") from the drop down list in the field labeled "Status".

STEP 3: Enter notes about the action(s) taken in the field labeled "Action Taken".

STEP 4: Enter the date completed or cancelled.

STEP 5: Select the name of the person who completed the call from the drop down list.

OPTIONAL: You can attach a document to the call by selecting .

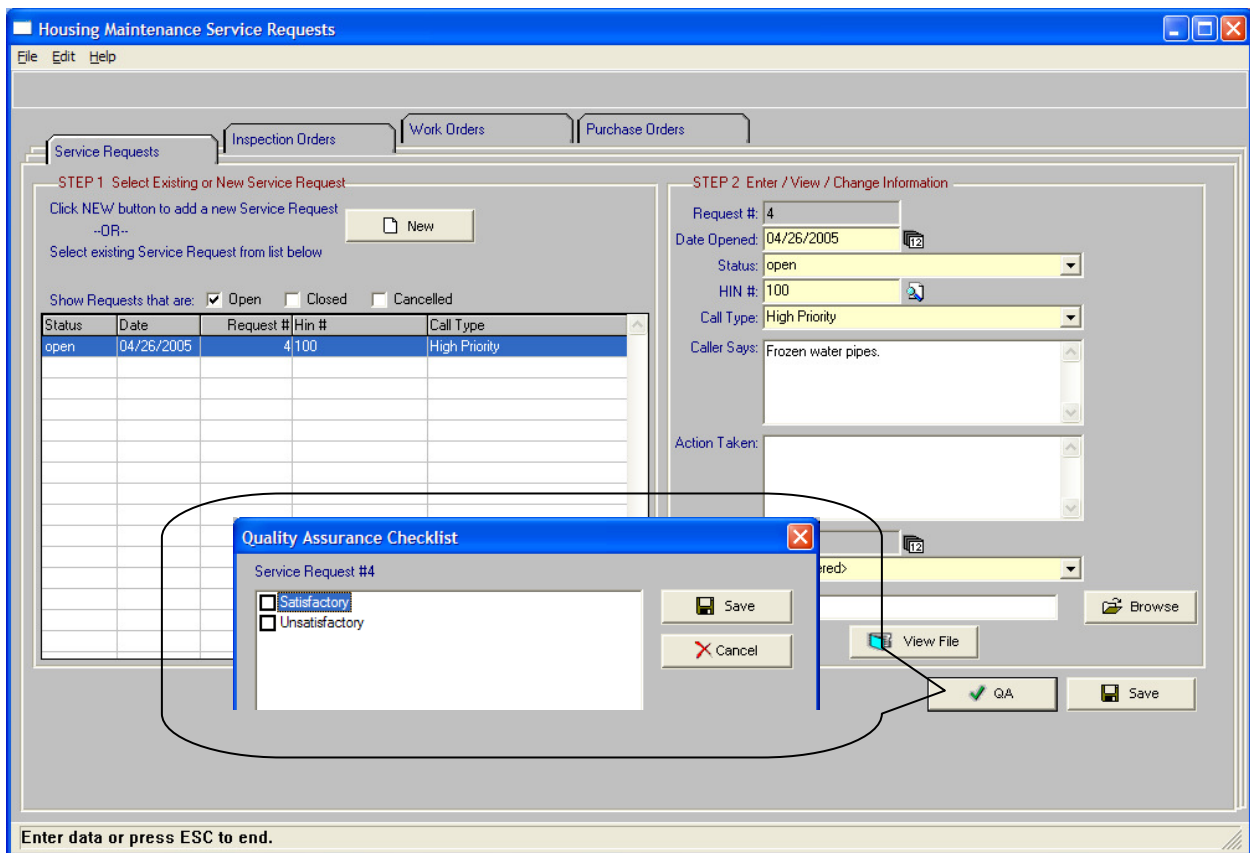
STEP 6: Click  to save your changes.

Quality Assurance Checklist

To ensure that all tasks pertaining to the call have been completed, a checklist has been added.

STEP 1: Click .

A pop-up window will appear with a list, as shown below:



The screenshot displays the 'Housing Maintenance Service Requests' application window. The main interface is divided into two sections: 'STEP 1 Select Existing or New Service Request' and 'STEP 2 Enter / View / Change Information'. In the 'STEP 1' section, there is a table with columns: Status, Date, Request #, Hin #, and Call Type. The first row shows 'open', '04/26/2005', '4', '100', and 'High Priority'. A 'Quality Assurance Checklist' pop-up window is overlaid on the main interface. This window has a title bar 'Quality Assurance Checklist' and a close button. It contains a label 'Service Request #4' and two checkboxes: 'Satisfactory' (checked) and 'Unsatisfactory'. There are 'Save' and 'Cancel' buttons at the bottom right of the pop-up. The main application window also has a 'QA' button with a green checkmark icon, which is highlighted by a callout line pointing to the pop-up window. The status bar at the bottom of the application window reads 'Enter data or press ESC to end.'

Status	Date	Request #	Hin #	Call Type
open	04/26/2005	4	100	High Priority

STEP 2: Check applicable item(s).

STEP 3: Click .

As with Maintenance Service calls, a Quality Assurance checklist is available to ensure that all tasks pertaining to the inspection have been completed.

STEP 1: Click 

STEP 2: Check applicable item(s).

STEP 3: Click .

Work Orders

STEP 1: Select the WORK ORDERS Tab at the top. You will then see the following window:


Figure 30

[illegible]

STEP 2: Click  New

STEP 3: Enter the date of work is scheduled to be done.

STEP 4: Select the appropriate status. *(The default status will be OPEN.)*

STEP 5: Click  at the end of the field labeled HIN# and find the housing unit.

STEP 6: Enter a brief description.

STEP 7: Select the name of the individual who will be performing the work intended.

STEP 8: Select the applicable Inspection Type from the drop down list.

STEP 9: Select the Inspector from the drop down list.

STEP 10: Click .

Quality Assurance Checklist

As with Maintenance Service calls, a Quality Assurance checklist is available to ensure that all tasks pertaining to the Work Order have been completed.

STEP 1: Click .

STEP 2: Check applicable item(s).

STEP 3: Click .

STEP 1: Select the PURCHASE ORDERS Tab at the top. You will then see the following window:

Figure 31

[illegible]


STEP 2: Click 

STEP 3: Enter the date of Purchase Order.

The default status will be OPEN.

STEP 4: Click at the end of the field labeled HIN# and find the housing unit.

STEP 5: Enter a brief description for the PO.

STEP 6: Click  at the end of the field labeled Contractor/Supplier.

STEP 7: Enter the Amount of the PO.

STEP 8: If the amount will be charged back, click and locate the party/individual.

STEP 9: Enter the details for the PO.

STEP 10: Click 

Quality Assurance Checklist

As with Maintenance Service calls, a Quality Assurance checklist is available to ensure that all tasks pertaining to the Purchase Order have been completed.

STEP 1: Click .

STEP 2: Check applicable item(s).

STEP 3: Click .

Section 4: Housing Application

OVERVIEW: This section describes how to manage housing applications, including historical information and statuses. Reports based in this information can be generated to assist with the decision making process.

This section has been divided into 3 sections, similar to that of a paper application and the information collected.

STEP 1: From the AIS Command Center, select HOUSING → APPLICATIONS. You will then see the following window:

STEP 2: While viewing the APPLICATION Tab, enter the date of the application.

NOTE: The default Application Status will be PENDING for all new applications.


STEP 3: Click  at the end of the Name field. You will then see the following pop-up window:

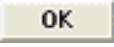
Figure 32

The screenshot shows a software window titled "Browse Citizen". It features a large list box at the top for displaying search results. To the right of this list are "OK" and "Cancel" buttons. Below the list box, there are three tabs: "Name", "First Nation", and "Id Numbers". The "Name" tab is currently selected. Under the "Name" tab, there are three text input fields labeled "Surname:", "Given:", and "Initials:". To the right of these fields is a "Find" button.

STEP 4: Enter the first few letters of the applicant's last name in the Surname: field. (You can also enter the first few letters of the applicant's first name in the Given: field to narrow down the list of search results.)

STEP 5: Click .

STEP 6: In the list of results, click on the applicant's name to highlight it.

STEP 7: Click . You will be returned to the APPLICATION window.

STEP 8: Select the appropriate Applicant Type from the drop down list.

STEP 9: Select the appropriate location from the drop down list.

STEP 10: Enter the number of people who will be residing in the housing unit.

STEP 11: Click .

STEP 12: The Applicant's name will appear in the list on the left side of the window. Click on the Applicant's name and select the INCOME Tab, as shown below:

Figure 33

Housing Application Income

File Edit Help

Application Income Present Situation

Application #: 1 Name: ADAMS, HEAVEN LEE

Income Information

Source of Income: Employment

Monthly Income \$: 2,500.00 ☒ Verified

Employer: First Nations Department of Health

Spouse's Monthly Income \$: 2,500.00 ☒ Verified

Spouse's Employer: First Nations Administration

Save

STEP 13: Select the applicant's Source of Income from the drop down list.

STEP 14: Enter the applicant's Monthly Income.

STEP 15: ☒ if the applicant's income source has been verified.

STEP 16: Enter the name of the applicant's employer.

STEP 17: Enter income information for a spouse.

STEP 18: Click .

STEP 19: Select the PRESENT SITUATION Tab at the top. You will then see the following window:

Figure 34

Housing Application Present Situation

File Edit Help

Application Income Present Situation

Application #: 1 Name: ADAMS, HEAVEN LEE

Present Situation Information

Location: ☒ In Community ☐ ON Reserve ☐ ON Settlement Land
☐ Remote ☐ OFF Reserve ☐ OFF Settlement Land

Type: Rental

Monthly Cost: 500.00

Condition of Present Home: <not entered>

in Household: 3

Save

STEP 20: Set and enter all details in the applicable fields according to the Application.

STEP 21: Click  Save.

After the decision process has been completed, set the status of the application accordingly, as described in the following section.

Modifying Application Status

STEP 1: From the AIS Command Center, select HOUSING → APPLICATIONS.

STEP 2: Locate the Applicants name in the list on the left side of the window and click on it to highlight it.

STEP 3: Change the Application Status field accordingly.

STEP 4: Click  Save.

STEP 4: Carefully review this report to ensure that all charges that should be generated are listed.

PRINT OPTIONS:

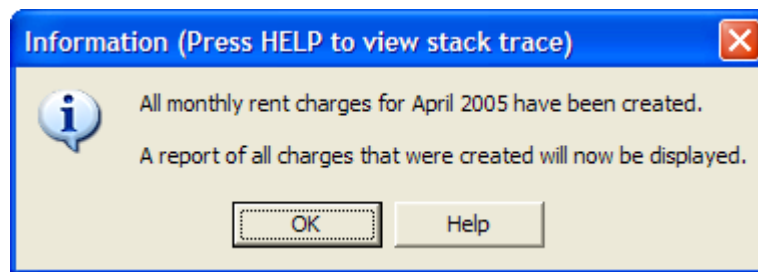
Select  to print the report; or select  to exit the print preview without printing.

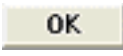
STEP 5: If all charges are listed correctly, select .

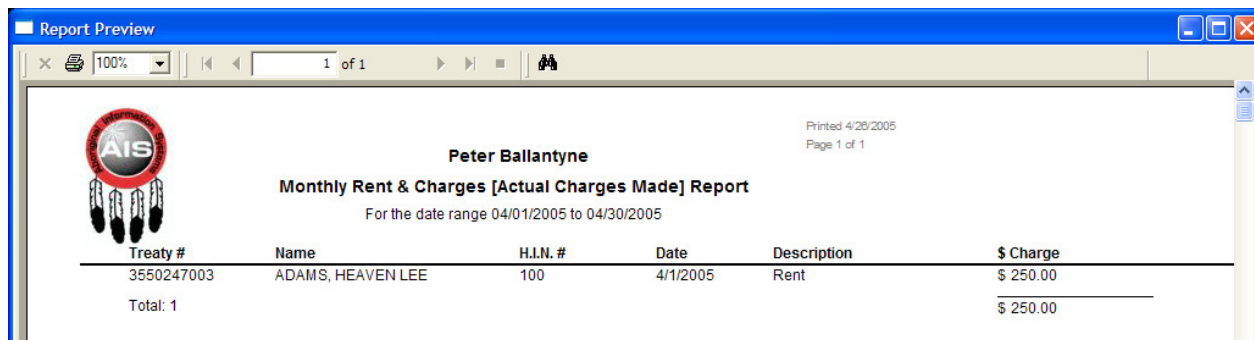
NOTE: *The PROCESS button will NOT be available until the charges are first PREVIEWED.*

You will then see the following message:

Figure 37

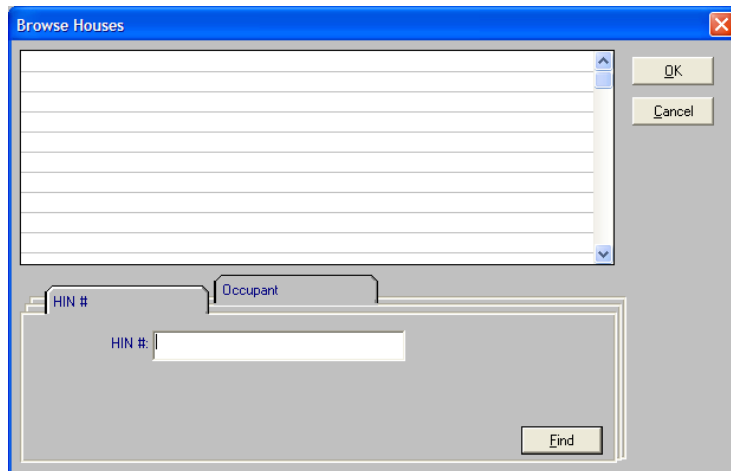


STEP 6: Click . The following report will then be previewed on screen:

A screenshot of a "Report Preview" window. It has a blue title bar and a toolbar with icons for zooming and navigation. The report content includes the AIS logo, the name "Peter Ballantyne", and the title "Monthly Rent & Charges [Actual Charges Made] Report" for the date range "04/01/2005 to 04/30/2005". It is printed on "Page 1 of 1" on "4/28/2005". The report is a table with columns: Treaty #, Name, H.I.N. #, Date, Description, and \$ Charge. It lists one entry for ADAMS, HEAVEN LEE on 4/1/2005 for Rent, with a charge of \$ 250.00. A total of 1 is shown at the bottom.

Treaty #	Name	H.I.N. #	Date	Description	\$ Charge
3550247003	ADAMS, HEAVEN LEE	100	4/1/2005	Rent	\$ 250.00
Total: 1					\$ 250.00

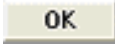
Figure 39



STEP 6: Type the first few numbers of the housing unit as the search criteria.

STEP 7: Click . A list of search results will appear.

STEP 8: In the list of results, click on the unit to highlight it.

STEP 9: Click . You will be returned to the Payments/Adjustments window.

STEP 10: Click .

STEP 11: Enter the date of the transaction.

STEP 12: Select the transaction type from the drop down list.

STEP 13: Enter the amount of the transaction.

STEP 14: Click .

Once you have saved this information, the field labeled Amount Owing is now updated.

Select the CHARGE HISTORY Tab at the top. You will then see the following window which displays a history of all charges and payments. No information can be modified here. It is for at-a-glance information purposes only.

Figure 40

[illegible]

Section 7: Supplier Invoice Payments

OVERVIEW: Vendor (supplier) invoices that you receive are usually broken down in two parts: the top half of the paper invoice provides *their* invoicing and billing details for their administrative purposes, such as date of invoice, invoice number, and date payment is due. The bottom half of an invoice then details work performed and/or parts and materials purchased and for which house the work was completed on. This is the same format that payment details are entered into AIS, which then creates the payment and payment details you will be processing. This information will also provide details in the financial reports based on a per unit query.

THIS SECTION IS CURRENTLY UNDER DEVELOPMENT AND WILL BE SENT TO YOU AS SOON AS POSSIBLE!!

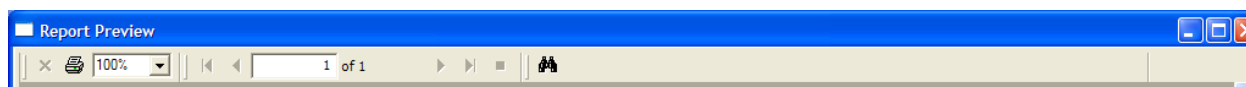
Section 8: Reports

OVERVIEW: The housing reports are categorized as follows:

- House List
- Renovation Applications
- Waiting List
- Maintenance Reports
- Financial Reports

The following sections describe each category in detail of the type of information you can collect based on your records.

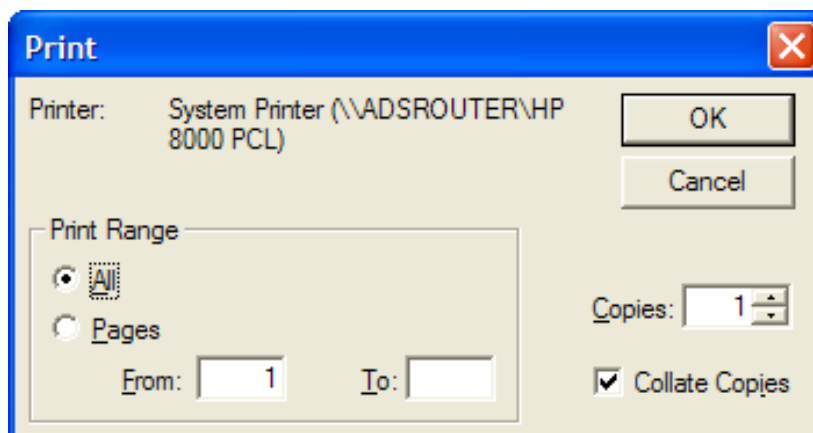
Regardless of the category, you will always see a “print preview” on screen before actually printing the report so you can make sure you are printing the information you want. When the report is on screen in “preview mode”, you will see a print toolbar at the top, as shown below:



Following describes the print toolbar buttons:

	Print		Next Page
	Zoom in or out		Advance to Last Page
	Advance to Page 1		Stop Loading
	Previous Page		Search Text
	Page Indicator		

After selecting the icon, you will then see the PRINT MANAGER WINDOW, as shown below:



House List Report

OVERVIEW: This report will provide a list of all housing units with the following information included:

- Housing Unit Number
- Type
- Ownership
- Year Built
- Occupancy Status
- Address
- Location Details.

How to Print this report:

STEP 1: From the AIS Command Center select HOUSING → REPORTS → HOUSE LIST ...

STEP 2: The Report will then be previewed on screen.

STEP 3: Choose the  icon to print the report.

Renovations Applications Report


OVERVIEW: This report will provide a list of all applications made for renovations with the following information included:

- Application Statuses
- Housing Unit Number
- Application Number
- Date of Application
- Occupant (Name of Applicant)
- System (Housing Component Description)
- Estimated Cost of Renovation

How to Print this report:

STEP 1: From the AIS Command Center select HOUSING → REPORTS → RENOVATIONS APPLICATIONS ...

STEP 2: The Report will then be previewed on screen.

STEP 3: Choose the  icon to print the report.

Waiting Lists

OVERVIEW: This report will provide a list of all applications for residency with the following information included:

- Application Number
- Date of Application
- Application Status
- Applicant Name
- Requested Location
- Type (ie: Rental)
- Applicant's Source of Income
- # of People who will be residing in the home
- # of Prior Applications on file for the Applicant

How to Print this report:

STEP 1: From the AIS Command Center select HOUSING → REPORTS → WAITING LISTS ...

STEP 2: The Report will then be previewed on screen.

STEP 3: Choose the  icon to print the report.

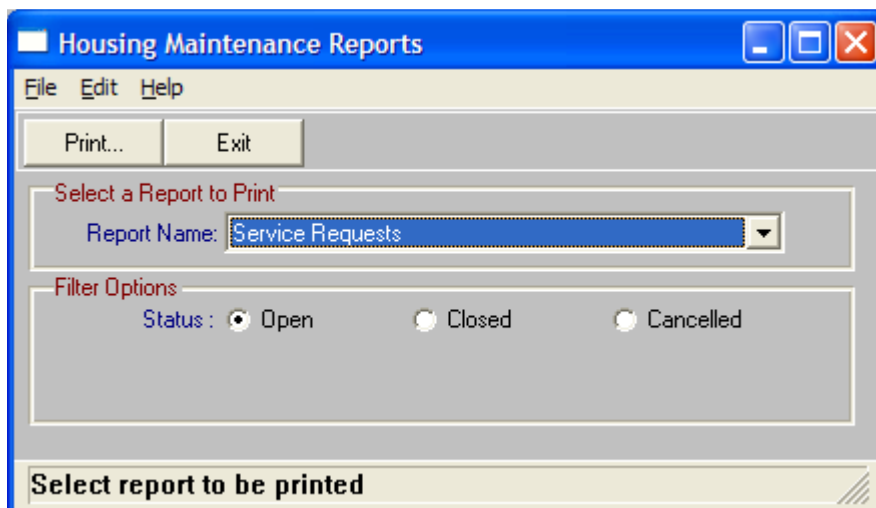
Maintenance Reports

OVERVIEW: This category has the following pre-formatted report styles for your convenience:

- Service Requests
- Inspection Orders
- Work Orders
- Purchase Orders


How to Print:

STEP 1: From the AIS Command Center select HOUSING → REPORTS → MAINTENANCE REPORTS. You will then see the following window:



STEP 2: Select one of the 4 reports from the drop down list.

STEP 3: Select the appropriate Status (open, closed, or cancelled)

STEP 4: Click . The report will then be previewed on screen.

STEP 5: Choose the  icon to print the report.

Financial Reports

OVERVIEW: This category has the following pre-formatted report styles for your convenience:

- Outstanding Rent & Charges
- Monthly Rent & Charges (Actual Changes Made)
- Payments & Adjustments Register

How to Print:


STEP 1: From the AIS Command Center select HOUSING → REPORTS → FINANCIAL REPORTS. You will then see the following window:



The screenshot shows a window titled "Housing Financial Reports" with a menu bar (File, Edit, Help) and buttons for "Print..." and "Exit". Below the buttons is a section "Select a Report to Print" with a dropdown menu showing "Report Name: Outstanding Rent & Charges". Underneath is a "Filter Options" section with "From:" and "To:" date pickers. At the bottom, a status bar says "Enter data or press ESC to end."

STEP 2: Select one of the 3 reports from the drop down list.

STEP 3: Select the appropriate date range.

STEP 4: Click . The report will then be previewed on screen.

STEP 5: Choose the  icon to print the report.